# Signing on

1. Establish an Internet connection and enter the following address: ***www.lexis.com***

2. Type your LexisNexis® ID and password and click ***Sign On***.

    Would you like to create a Custom ID and password, e.g., an easy-to-remember alias or nickname? See below.

3. After signing on, click a tab at the top of the screen to select a research option:
    *   ***Search***
    *   ***Research Tasks***
    *   ***Search Advisor***
    *   ***Get a Document***
    *   ***Shepard's***®
    *   ***Alerts***

Enter ID
Enter Password
Click Sign On
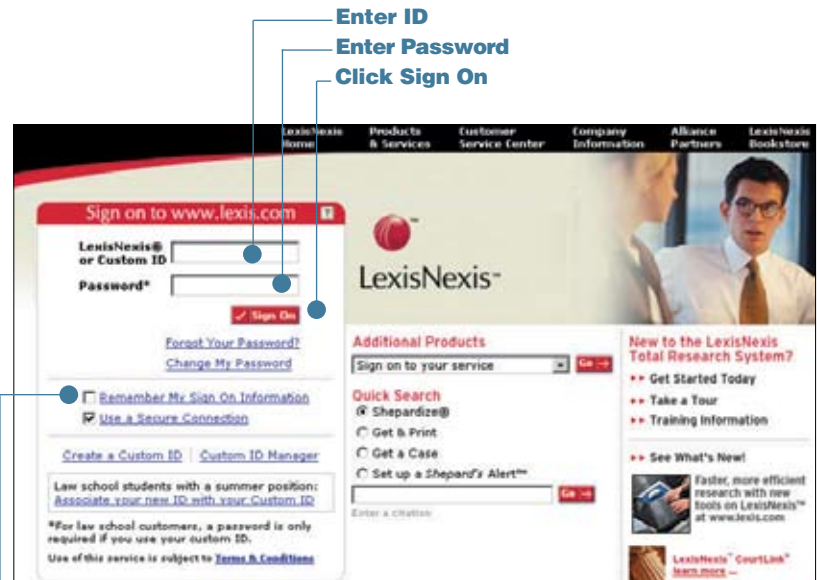
The Remember My Sign On Information link is a great time-saving option for your personal computer. Automatic sign on promptly moves you to the LexisNexis services.
Remember My Sign On Information is not recommended for public work stations.
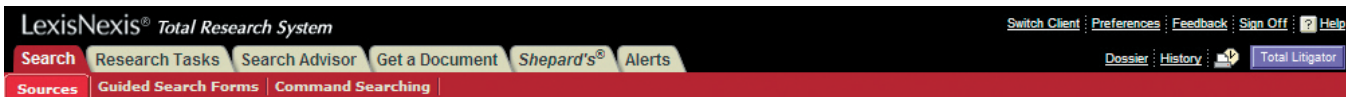
Create a Custom ID and Password

Each Custom ID is unique, i.e., no two LexisNexis subscribers can create the same Custom ID. Use your Custom ID or your LexisNexis-assigned ID when you sign on.

1. Click the ***Create a Custom ID*** link on the sign-on screen, then enter your current LexisNexis ID and password.

2. Type your new Custom ID and password. (Your Custom ID must be 6 – 25 characters and contain at least one letter. Your password should adhere to password guidelines listed on the screen.)

3. For security purposes, enter your e-mail address, choose a security question from the drop-down menu, and provide an answer. Click ***Finish.*** *(Follow the screen instructions for printing a Custom ID card!)*

Forgot your password? Choose this link on the sign-on screen.
Enter your Custom ID and answer your security question. LexisNexis will send you an e-mail with a link to a secure Web site that contains your password. If you forget your Custom ID, contact LexisNexis Customer Support.

To change your Custom ID or password, your e-mail address for Custom ID, your security question and answer, etc., use the ***Custom ID Manager*** link on the sign-on screen.

1 Actual screens may vary slightly due to the frequent enhancements and product additions.

Retrieve individual documents from LexisNexis quickly and easily with the Get a Document tab. Use the citation, the names of the parties, or the docket number to retrieve documents.

Get a Document by Its Citation

1 Click the **Get a Document** tab.

2 Click the **Citation** tab. (Citation is also the default setting.)

3 Type in the citation for the document you want to retrieve, e.g., *253 f3d 34*

4 Click **Get**.

Citation Format Assistant

If you are not sure of the citation format for the document you want to retrieve, click **Citation Formats**.

Option 1: Find a Citation Format

Enter a complete or partial publication name. For example, type: *virginia journal* or *virginia journal of international law*. Click **Find**.

Option 2: Explore Publications Alphabetically

Click a letter of the alphabet in the letter navigation bar to view publications beginning with that letter.

Click the abbreviation to the right of a publication name. A template like the one below will appear. Enter an appropriate citation in the template and click **Get.**

Get a Document by Party Name

1 Type the names of the parties in the Party fields (the party names do not have to be in plaintiff vs. defendant order, e.g., *united states* in the first box and *microsoft* in the second box). If you only know the name of one party, type it in the first box.

2 Choose the jurisdiction for the cited case you would like to see.

3 You may choose the court that relates best to your case (optional).

4 Select a date range from the drop-down list (optional).

5 Click **Search**.

Party Name

Get a Document by Docket Number

1 Type a docket number in the Docket Number field, for example, *00-8452*.

2 Choose the jurisdiction for the cited case you would like to see.

3 Select a date range from the drop-down list (optional).

4 Click **Search**.

Docket Number

NOTE:

Because letters rather than numbers are sometimes used in the first part of the docket number, and an abbreviation for the court or type of matter may appear between two numbers, the safest way to search for a docket number is by using the AND connector.

For example, to search for "92 CIV. 7703" you would type *92 AND 7703* in the Docket Number field.

LexisNexis® Research Tasks Pages

These special menu pages focus on specific areas of law or jurisdictions, pulling together the valuable resources practitioners need for that area. Research Tasks pages **combine source selection and searching** on a single page. Select a source from a drop-down menu, add your search words and click **Go**. Or link to additional tasks.

Each Research Tasks page is unique to that practice area; however there are common components. For example, most pages offer legal news, forms, Get a Document and/or *Shepardize®*, analytical materials by Matthew Bender®, CCH®, BNA® and/or other major publishers, links to related Web sites and more.

To select a Research Tasks page, click the **Research Tasks** tab. Choose your practice area or jurisdiction. Or, select an area of law on the Legal menu screen. A link to the appropriate Research Tasks page will be included.

To set your Research Tasks tab as your **starting point after you sign on** to **www.lexis.com**, click the Preferences link (top right on main menu screen). Select **Research Tasks** under **Start Location**. Click **Set**. Then, to make a specific Research Tasks page, e.g., Bankruptcy, Tax, your starting point, select the Set as my Default Research Task Page link at the top of that page.

A   Combine often-used tax sources into one search.

B   Click to move to the latest news—without entering search terms.

C   Get a document. Select the type; enter the citation. Click Go.

D   Select other tasks. Just click a link.

E   Move to task boxes for complementary tasks.

F   Move to court dockets and other LexisNexis products

Lexis® Search Advisor

Find Relevant Cases, Analytical Materials & More

Lexis Search Advisor is a logical way to begin your research in a specific area of law. Select your practice area, search for your topic—or click topic categories, drilling down to your topic. Then quickly retrieve relevant information from case law, law reviews, treatises, agency materials and legal news. Lexis Search Advisor can even retrieve all available cases with LexisNexis® Headnotes and/or In-Depth Discussion cases on your topic. Finally, Lexis Search Advisor can help you build your search by suggesting terms of fact and law.

To use Lexis Search Advisor, click the **Search Advisor** tab.

First, Choose a Lexis Search Advisor Topic. Use:

Choose From Recently Used Legal Topics

1. Click the down arrow next to the open field to display a list of the last 20 topics you used.

2. Highlight the topic you want to use. Click **Go.**

Option 1: Find a Legal Topic

Here's how to find legal topics on a subject:

1. Enter *fair use* in the box under **Option 1: Find a Legal Topic**.

2. Click **Find.** Review the displayed topics. Click the topic you need.

Option 2: Explore Legal Topics

Explore Legal Topics drills down through the areas of law, displaying topics in a table of contents. Use this option when you know which area of law covers your issue. For example:

1. Click **Copyright Law.**

2. Click the + next to **Civil Infringement Actions.**

3. Click the + next to **Defenses.**

4. Click the + next to **Fair Use.**

5. Click **General Overview.**
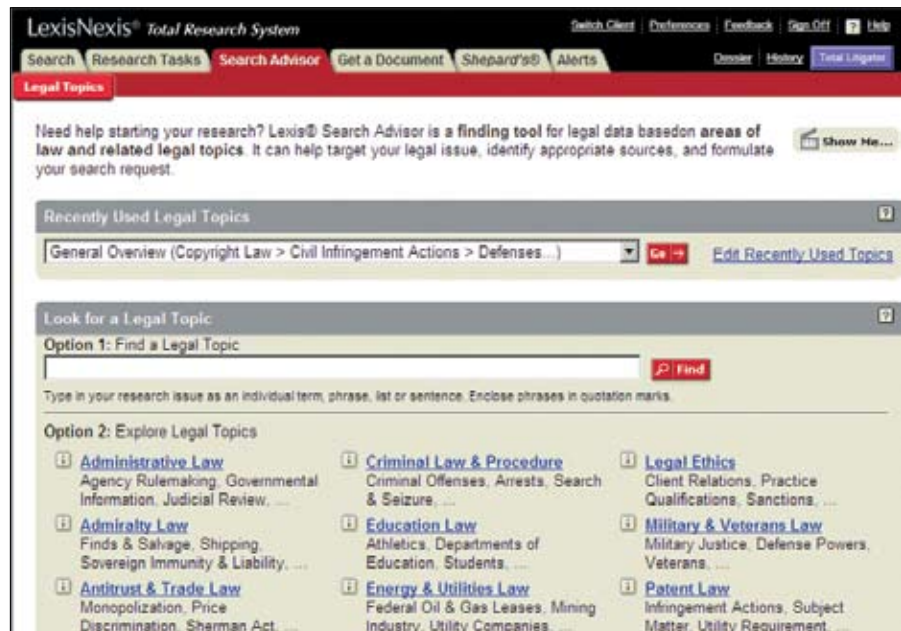
Choose Your Research Materials

The type of material shown on your topic search screen (below) depends on your topic. Find source tabs for cases, analytical materials (which includes legal news), agency materials, etc.

Search for LexisNexis Headnotes on your topic. Or you can search the available resources with terms and connectors or natural-language phrases or questions. (See the Completing the Search Form on page 9 for tips.)

Your Topic Search Screen
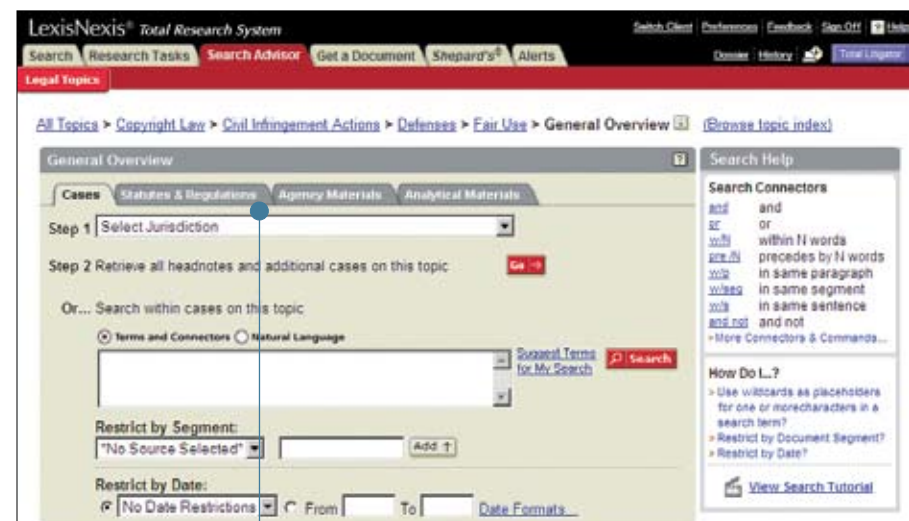
Source Tabs

Retrieve All Headnotes Via Lexis Search Advisor

Retrieve All Headnotes finds LexisNexis Headnotes written on that topic, plus additional highly relevant cases. You can enter the Retrieve All Headnotes feature from the Cases tab for your Lexis Search Advisor topic or from any case's LexisNexis Headnotes.

To retrieve all headnotes and additional highly relevant cases from the Search Advisor **Cases** tab (See page 5.):

1. Select a jurisdiction you wish to research.
2. Click **Go** located next to Step 2.

To retrieve all headnotes and additional highly relevant cases when you are **viewing a case's LexisNexis Headnotes**:

(Each headnote includes at least one Lexis Search Advisor path to a topic. You can also link to any level of the Lexis Search Advisor hierarchy within this path.)

1. Click the **green-arrow icon** at the end of the topic path above the headnote. (See page 16 for an example.)
2. Select a jurisdiction. (You can also restrict to particular dates, if you wish.) Click **Go.**

Viewing *Retrieve All Headnotes* Results

Your results for Retrieve All Headnotes and More Like This Headnote (see Analyzing Results on page 12) are displayed in the **Virtual Digest** view, which shows case citations, plus their relevant LexisNexis Headnotes and/or paragraphs most relevant to your topic. You can:
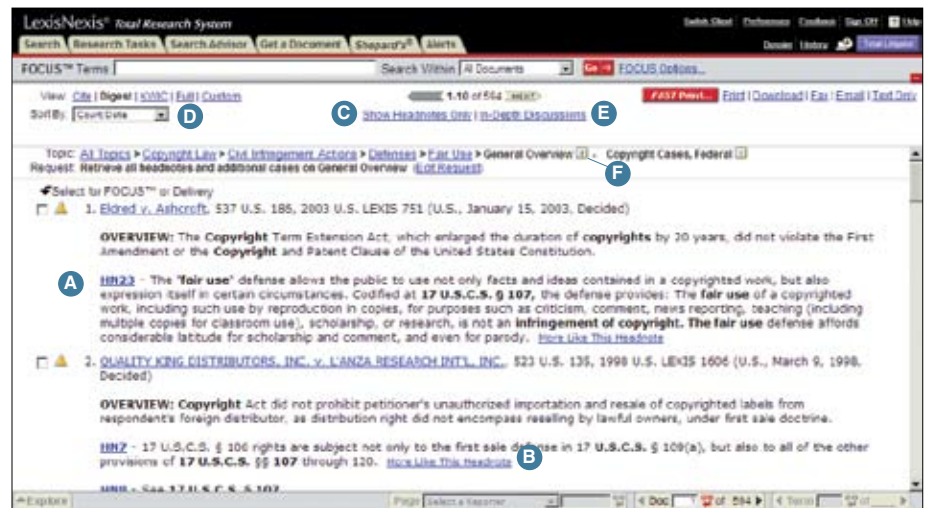
A Link to the discussion of the headnote in the opinion. Click its link, e.g., **HN23**. You can also link to the full text of any paragraph shown. Click its pinpoint page cite, e.g., **[*312]**

B Use the More Like This Headnote feature to find additional headnotes. Click a headnote's **More Like This Headnote** link.

C You only want cases with headnotes classified under the topic. Click the **Show Headnotes Only** link at the top of the screen.

D Find the cases most frequently cited by the other cases under the topic, i.e., the "influential cases." Click the down arrow next to the Sort By box at the top of your results screen. Click **Frequently Cited.**

Following each citation in the Frequently Cited sorting list, find the number of citings listed in green. To move to those case citings, click the **View** link. Then, to see each particular citing reference listed, click the **Show Hits** link.

E View In-Depth Discussions only. (You want a better understanding of the topic.) Click the **In-Depth Discussions** link. *You get the top 15 cases that provide significant explanation of your topic.*

F Click on the "i" icon next to your topic and get details on what that topic covers. For example, Fair Use Factors *"covers the factors listed in 17 USCS §107 to be considered in determining whether the use made of a work in any particular case is a fair use, including the purpose and character of the use; the nature of the copyrighted work; the amount of substantiality of the portion used; and the effect upon the plaintiff's potential market."* Also find selected search terms important to this topic.

Search

Selecting Sources

The Search/Source selection screen displays by default after you sign on at *www.lexis.com* At this screen, you can select a source in any of five ways:

Ⓐ **Choose From Recently Used Sources**
1. Click the down arrow beside the field to display a list of the last 20 sources you used.
2. Highlight the source you want to use.

Ⓑ **Explore Sources Using the Legal, News & Business, and Public Records Tabs**
Select sources by pointing and clicking through the source hierarchy until you reach the source in which you want to search. The most commonly used sources (e.g., federal and state case law, news stories from the last two years, Person Locator sources) are listed at the top under each tab.

1. Click the tab for the type of content you think is most relevant. Continue working your way through the sources by pointing and clicking. Note that each selection you make in the source hierarchy creates a "trail" of your path.
2. Click the individual source in which you want to search.

Ⓒ **Find A Source—Using the Long Name**
1. Click the *Find a Source* tab.
2. Type a source name or partial source name in the Find a Source box.
    (Make sure the **Match terms in long names** button is selected.)
3. Click *Find*.
4. A list of sources that match the description will display. Click the name of the source you want to search.

Ⓓ **Find a Source—Using the Short Name**
1. Click the *Find a Source* tab.
2. Type the short name of the source (library; file name, e.g., GENFED;US) in the Find a Source box. (Make sure the **Short Name** button is selected.)
3. Click *Find*.
4. Click the source you want to search.

Ⓔ **Find a Source—Using the Alphanumeric Links**
1. Click the *Find a Source* tab.
2. Click the alphanumeric (0 – 9 or A through Z) links to find a specific source.
3. Click the name of the source to use it.

NOTE: Your menu or subscription determines which tabs appear.

NOTE: To delete individual sources from your list of 20 most used sources (those you don't use regularly), click *Edit Sources.*
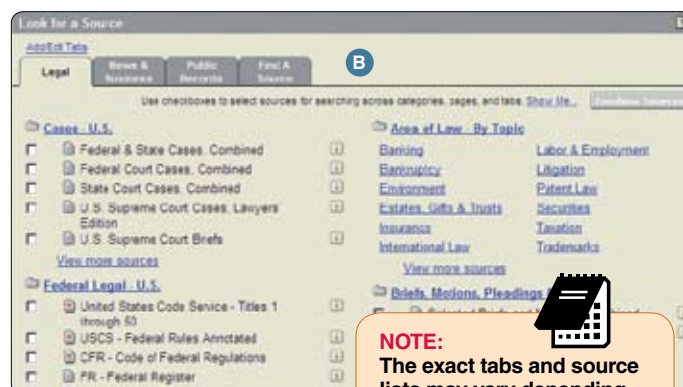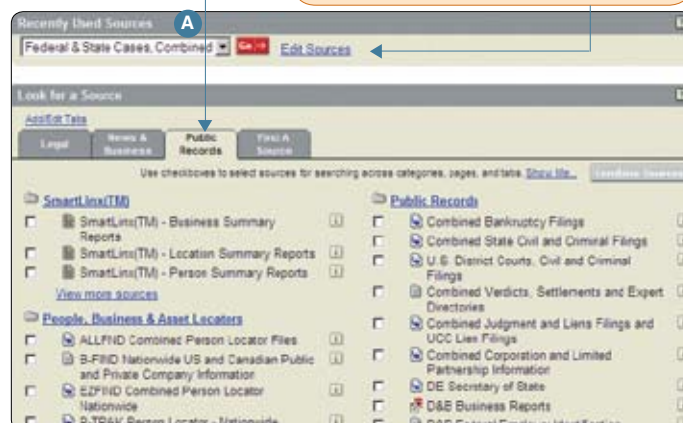
NOTE: The exact tabs and source lists may vary depending on your subscription plan.
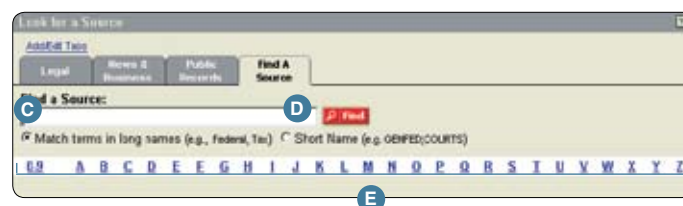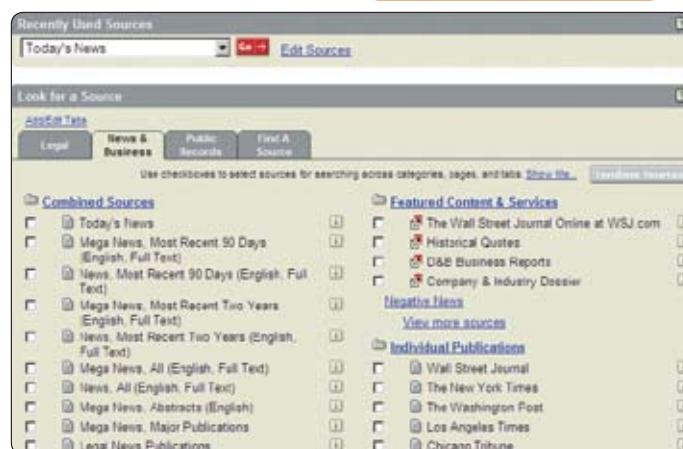
Combine Search: Combining Multiple Source Types

Combine up to 50 sources in a single search, even different source types, e.g., cases, statutes, legislation, agency decisions and news.* Each source you can combine has a white checkbox next to the source name. To combine sources:

1. **Check the box next to a source.** For example, under the Legal tab, select the Intellectual Property Cases, Administrative Decisions & Regulations plus selected Patent Briefs, Motions, Pleadings and Jury Verdicts and Settlements.
2. Now move to another tab. Click the News & Business tab. Check *News, Most Recent Two Years (English, full text)* Your Legal tab sources are still saved.
3. When you're done selecting sources, click the **Combine Sources** button. You move to the online Search Form. (See next page.)

(See page 13 for tips on analyzing the Combined Search tabbed results.)
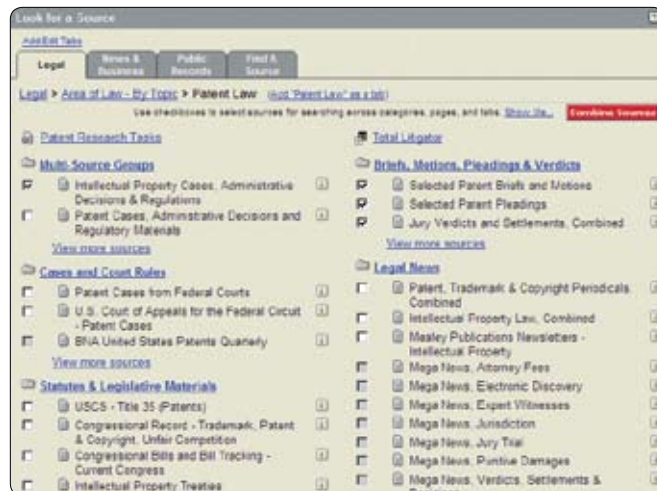
*Public records sources are not available for combining.

Custom Tabs

You can create up to 14 custom tabs in addition to the four standard tabs (Legal, News & Business, Public Records, and Find a Source), so the jurisdictions, areas of law, and other source types you research most often are only a click away. You can easily remove or reorder a custom tab at any time. To add or edit a custom tab:

1. Click **Add/Edit Tabs**.

2. Select an item in the list and either double-click it or click **Add** to create a tab for the item. Click an item which has a custom tab and click **Remove** to delete it from the source selection page.

3. Click **Move Up** to move a selected current tab closer to the existing tabs on the first row of the source selection page.
4. Click **Move Down** to move a selected current tab farther away from the existing tabs on the source selection page.
5. Click **Show this tab at the beginning of each session** to have a custom tab from the pull-down menu appear at the beginning of each research session.
6. Click **Done** to apply any changes you have made.

Completing the Search Form

Once you select your sources, you're ready to enter your search on the online Search Form.

1. Select the search format you want to use.

    Terms and Connectors (Boolean search logic) uses words and connectors to create phrases and concepts. For example, *drug /15 test! OR screen! /10 employ!*

    Click on a connector in the online Search Connectors box for examples. Also see page 11.

    Natural Language (the FREESTYLE™ feature) uses "plain English" questions or phrases (as you would in conversation), e.g., *Can employment drug screening be a contract arbitration issue?* Use Natural Language to research conceptual issues rather than specific topics or when you're searching complex issues and are unsure of the words to use. Results are ranked by relevance.

    LexisNexis® Easy Search™ is for simple, two to three word searches in Boolean or Natural Language (similar to Internet search engines). Use quotation marks for "phrase searching." You cannot use segment or date restrictions. Results are ranked by relevance.

2. Type your search words. Click **Suggest Terms for My Search** to find additional terms. Other options:

    For Terms and Connectors searches—Search specific parts or **segments** of documents. Click the drop-down **Select a Segment** box for a list of available segments. Choose a segment and enter your search terms. Click Add. (If you know the segment name, you can type it in the search box followed by your search terms in parentheses.) Also see **Segment Searching** at right.

    For Natural Language searches—If you want a term to appear in retrieved documents add **Mandatory Terms.** Or select a **Segment** and enter Mandatory Terms you want to appear in the segment.

3. *Time to Double Check.* Click Check Spelling. You'll save time and improve accuracy. Not only can you replace misspelled words, but you may also find alternate search words.

4. Click **Search.**

Segment Searching

All documents at **www.lexis.com** are divided into parts that are common to that document type. For example, cases contain the party names, a docket number, date, court issuing the opinion, the opinion itself, etc. You can restrict your search to a specific segment of a document, such as the headline of a news story, the judge who wrote the case's opinion, the heading of a statute, etc. See Step 2 at left for directions on adding a segment search. For example, to find:

Cases when you know the **names of the parties**:
ENTER: *name (mackey AND byrd)*

All opinions written by a **particular judge**:
ENTER: *writtenby (scalia)*

Cases in which a particular **law firm** participated:
ENTER: *counsel (marbury AND madison)*

Cases decided on, before or after a particular date:
date is 2/01/2002
date bef 2/01/2002
date aft 2/01/2002

All sections of Title 18, Chapter 96 of the *U.S. Code* dealing with Racketeer Influenced and Corrupt Organizations:
ENTER: *heading (18 AND 96 AND racketeer)*

News stories that mention the *Sarbanes-Oxley Act* in the headline or lead paragraph:
ENTER: *hlead (sarbanes oxley)*

Search Words and Connecting Search Words

Words

A search word is a single character or characters, alphabetical or numeric, with a space on either side. A **hyphen** is treated as a space.

Examples:		
	mcpherson	one searchable word
	§1988	one searchable word
	§ 1988	two searchable words
	pretrial	one searchable word
	pre-trial	two searchable words
	pre trial	two searchable words

Plural and **possessive** forms of regular nouns are retrieved automatically. *City* finds *city, cities, city's or cities'. Writ* finds *writ, writs, writ's or writs'.* For irregular nouns, see Universal Characters.

Equivalents are retrieved automatically. For example, *cal* finds *California, CA, Calif.* and *California.* Use any form; find its equivalents.

@—Use this symbol if your keyboard doesn't offer the section symbol (§), e.g., @305 or @ 305

Precision Search Commands

In addition to Connectors (see next page), you can also use these commands with your search words.

allcaps(aids) OR acquired immun! finds words with all capital letters, e.g., AIDS

nocaps(aid) finds *aid* but not *AIDS*

caps(jobs) finds first-letter capital, e.g., *Steve Jobs* but not *jobs* market

plural(job) finds plural forms <u>only</u>, e.g., *Steve Jobs* but not *job* creation

singular(job) finds singular form only, e.g., *job discrimination*

atleast10(cercla) finds documents that mention CERCLA <u>at least</u> 10 times. Good for finding documents with major coverage of your topic. Use any number between 1 and 255 with the ATLEAST command.

Universal Characters (wildcards)

The asterisk *

Replaces one letter. Use more than one * in a word, anywhere except as the first letter.

*wom*n* — finds *woman* and *women*
bank*** — finds *bank, banking, banked,* but not *bankrupt* or *bankruptcy,* which have more than three letters after *k.*

The exclamation point !

Replaces an infinite number of letters after a word root. Use only one ! per word, at the word end.

litigat! — finds variations on *litigate (litigation, litigating, litigator, litigated,* etc.)

child! — finds variations on *child (children, childless, childish,* etc.)

Connectors

Connectors establish relationships among search words. Next to the online search form, use the **Search Connector box** to help select connectors. (Rest your cursor on a connector and view its definition and an example. Click <u>View Search Commands</u> for more details.)

CONNECTOR	EXAMPLE

OR   *doctor or physician*
finds **either** doctor or physician.

AND   *bank AND deregulat!*
finds bank and forms of the word deregulate **anywhere** in the same document.

/n   *market /5 share*
finds *market* **within five words** of *share*. Using */5* links two words that may appear side by side or separated by up to four words. Get *share of the market* as well as *market share*. (You cannot use /n in the same search with /p or /s.)

/p   *rule /p sanction*
finds *rule* within the same **paragraph** as *sanction.*

/s   *sanction /s frivolous*
finds *sanction* within the same **sentence** as *frivolous.*

PRE/n   *pay PRE/3 television*
finds documents in which the first word **precedes** the second by three words or less.

NOT/n   *rico NOT/2 puerto*
looks for documents with the first word. The second word need not be found, but if it is, it **cannot be within** two words of the first word.

AND NOT   *trust AND NOT charitable*
finds documents with *trust* but **without** *charitable* **anywhere** in the document. Use AND NOT as the last connector in your search.

How Connectors Work

Connectors operate in the following order of priority:

First	**OR**
Second	**/n, PRE/n, NOT/n**
Third	**/s**
Fourth	**/p**
Fifth	**AND**
Sixth	**AND NOT**

If you use two or more of the same connectors, they operate left to right and, if number connectors are used, the smallest number operates first.

Here's an example of how connectors operate:
bankrupt! /25 discharg! AND student OR college OR education! /5 loan

1.   **OR** creates a unit, joining *student OR college OR education*
2.   **/5**, the smaller of the number connectors, ties together *loan* and the unit of *student OR college OR education*
3.   **/25** creates a unit of *bankrupt! /25 discharg!*
4.   **AND** operates last and links the units formed in 2 and 3.

Using Parentheses to Change Priority

Example:
mary /3 smith OR jane /3 jones OR william /3 matthews

This search looks for *smith* OR *jane* and then *jones* OR *william.*

Use parentheses to override the normal priority and create units of *mary* and *smith*, *jane* and *jones* and *william* and *matthews*. This search will now look for documents with one, two or all three of the name units.

(mary /3 smith) OR (jane /3 jones) OR (william /3 matthews)

Viewing and Analyzing Results

The LexisNexis services provide all the tools you need to analyze documents quickly, identify those that are on point, and retrieve additional relevant documents such as news articles and public records.

You'll find a variety of ways to display documents that let you review your results as efficiently as possible.

Display Formats

Cite—displays a bibliographic list of the citations.

KWIC™ +25—the default lets you display a 25-word window of text around your search terms. To vary the number of words, click **KWIC**, then click **KWIC +25**. Type a number from 1 to 99. Click **OK**.

Full—displays the full text of your document.

Custom—lets you display the document parts or **segments** you want to view.

TOC View—Sources arranged hierarchically by topic, such as statutes, regulations and treatises are displayed automatically in TOC (Table of Contents) format. Browse or search the TOC. (Though not shown here, turn to page 19 for TOC navigating and searching details.)

Cite List Overviews

Cite List Overviews, as shown at right, provide you a summary of the case's legal issues to help you quickly determine which documents in your results are relevant.

Virtual Digest View—(Available for Retrieve All Headnotes results and More Like This Headnote results only. Not shown here. See page 16.) Shows case citations, plus relevant LexisNexis Headnotes and/or paragraphs most relevant to your topic.

1 **Case Summaries**—written by LexisNexis attorney-editors, they include Procedural Posture, Overview and Outcome. (Also see page 14.)

2 **Core Terms**—for a snapshot view of the case.

3 **Show Hits**—displays each sentence where your terms appear in the case.

4 **Tag Docs**—quickly check the cases you want to print/download or to use for a FOCUS search.

5 **Shepard's Signal**—check on the warning, caution, or positive treatment indicator to *Shepardize* the case.

LexisNexis Combined Search—Tabbed Results Sets

After you enter your Combined Search (see page 8 for details on combining sources), you can see how many documents were found for each source type—quickly. You receive a summary page with tabbed results, offering up to 12 tabs by source type, e.g., case law, statutes and regulations, etc.

- Click a blue link to view results for a source type. The number at the end of the link, e.g., CFR - Federal Tax Regulations - 5, is the number of documents retrieved.

- Click a specific tab to show all the results for that tab.

- Rest your cursor on a tab's red arrow, e.g., on the Agency Materials tab, and a pop-up screen shows you the document types available under that tab.

Your results tabs stay at the top of your screen as you browse documents for easy navigation. And you can print your results table summary as well as specific documents and document types. Just click the Print Table Summary link.

LexisNexis® Practitioner's Toolbox For USCS and State Statutes

NOTE:
Practitioner's Toolbox is available in more than 20 state statutes as well as USCS. More states are being added regularly.

This special display, available only in full-text USCS and some state statute documents, makes navigating statutes fast and easy. The Practitioner's Toolbox also provides links to a variety of resources cited or referenced within the statute. And find links to enacted legislation that could affect that section.

The Practitioner's Toolbox appears on the right side of your document. Each toolbox is unique to that statute, displaying only those section headings that occur in that statute. Click to move to a section within the statute or to references cited.

Browsing Documents

LexisNexis® Case Summaries
Written by attorney-editors, **Case Summaries** are targeted synopses of cases. Each case summary contains three sections:

1 **Procedural Posture** describes the case's procedural history—how the case arrived before the court.

2 **Overview** provides a brief review of the court's holding on the legal issues raised.

3 **Outcome** reviews the procedural disposition of the case.

LexisNexis® Core Terms
Core Terms are the most frequently used words and phrases from the text of a case. They offer you a quick snapshot of the content based on the court's own language.

LexisNexis Headnotes
LexisNexis Headnotes are key legal points of a case drawn directly from the language of the court.

Use LexisNexis Headnotes to:

A Track the language used by the court in discussing the key points of law in the case.

B Uncover additional information by linking directly to relevant sections in the case, other related documents, related headnotes, or to Lexis Search Advisor.

C Review the main points of a case easily, online or offline.

See page 16 for more details on how to use LexisNexis Headnotes to find additional cases.

Using the Lower Navigation Frame

Use the navigation frame at the bottom of your search results page to go to specific points in a document, go to a specific reporter page in paginated legal documents, display a particular document, or go to a specific search term.
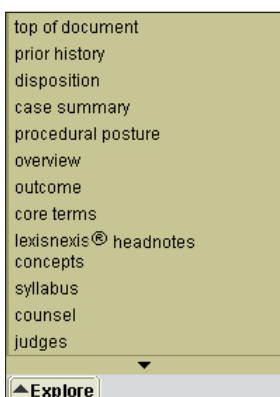
① **Navigating to a specific part of a document**

When a document is displayed in Full format, you can click the **Explore** button, then use the menu to navigate within the document. Also move to the top of the document.

② **Navigating to a specific reporter page**

Click the reporter name in the drop-down list next to **Page** (or in the running header of the document). The reporter name you select will be highlighted at the top of the page in red; the page references for that reporter will be highlighted in the document in red. Then click the text box next to **Go**, enter the page number you want to display, and click **Go**.
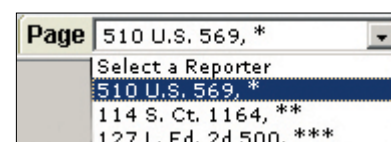
③ **Displaying a Document**

To display a particular document, enter its number in the box next to **Doc** and click **Go** (the number of documents in your results is displayed next to the Go button). Use the right or left arrows to go to the previous or next document in your results.

④ **Navigating to a Specific Search Term**
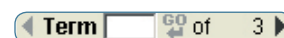
To go to specific search terms in the document:

• Click the right arrow to go to the first search term in the document

• Enter the number of a search term in the box next to **Term** and click **Go** to go to a particular search term (the number of search terms in the document is displayed next to the Go button)

• Use the right or left arrows to go to the previous or next search terms in your results

Finding More Documents

Sometimes you find a document that is right on point. You then want to know if there are other documents with similar fact patterns or similar language. At **www.lexis.com**, you can use LexisNexis Headnotes, Core Cites, Core Terms or text you select yourself to find other similar, relevant documents.

More Like This Headnote

Are there more headnotes like this in other cases? The More Like This Headnote feature will show you. When you find a relevant LexisNexis Headnote within a case, use this feature to find other cases with headnotes that contain similar language. The More Like This Headnote feature will also find closely matching language within the text of the opinion.

Once you find a relevant LexisNexis Headnote:

1. Click the **More Like This Headnote** link at the end of the headnote.

2. Choose your jurisdiction. Click **Search**.

3. Review your results in the Virtual Digest view—a view that includes retrieved headnotes and the most closely matched paragraphs in the opinion. You can receive up to 250 cases with the most closely matched headnotes or case discussions, ranked by relevance. Use the Sort By box at the top of the screen to re-sort by court/date or date. Use the links in the Digest view to move to particular cases, matching headnotes or discussions.

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More Like This–Core Cites and More Like This–Core Terms

More Like This–Core Cites finds cases with similar citation patterns to your on-point case.

To find more documents like the one you are viewing:

1. Click the **More Like This** link at the top of your results screen.

2. To find cases with similar citation patterns, click the **Core Cites** button. OR, to find cases with similar Core Terms, click the **Core Terms** button.

   (To remove Core Terms from your search, uncheck the box next to that Core Term. If you wish, add additional Core Terms in the search box below the checked Core Terms.)

3. (Optional) Add mandatory terms and restrict the search by date.

4. Click **Search**.

More Like Selected Text

If you see a particular passage in a document that is relevant, you can create your own More Like This search. For example, you're viewing *Campbell v. Acuff-Rose Music,* 510 U.S. 569 (1994), which deals with a summary judgment decision in a copyright infringement case. You see the relevant passage. Highlight the passage and click *More Like Selected Text* at the top of the results screen. The More Like This feature will enter a search using the terms you highlighted. Click **Search**. For best results, keep your selected passage relatively brief, e.g., not more than a paragraph. Concentrate, if possible, on a single issue.

Case Law Links

In LexisNexis case law, names of companies, judges and counsel are linked, i.e., select the drop-down arrow next to the link and move right to additional search results. For example, link to a company name and choose recent news, SEC filings, agency decisions regarding that company, U.S. and state cases where the company is a party and more.

Narrowing Your Results with the FOCUS Feature

As you analyze the documents you find, you may decide to narrow your focus to a particular issue within your topic. Use the FOCUS feature to pinpoint words within your search results—even if those words were not part of your original search request.

To enter a FOCUS feature search, after you review your search results:

1. **Go to the FOCUS terms bar at the top of your results screen.**
2. **Type your search words, e.g.,** *AND fair use*
3. **Click** *Go.*

The FOCUS feature will automatically search all of your retrieved documents. Or select specific documents. As you review your results, click the *Select for FOCUS™ or Delivery* checkboxes for documents you want to research further. The checkboxes appear in CITE, KWIC™ or FULL displays.
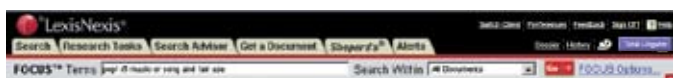
Reviewing Your Search History Feature

Your LexisNexis searches and search results are saved automatically under the Recent Results tab of the Search History log for 24 hours. For example, if you run a search at 5 p.m. Monday, the results will be kept in the History log until 5 p.m. Tuesday ET. View the original saved results until 2 a.m. without incurring additional search charges.

Searches (but not the results), including LexisNexis® Alert updates, are saved for an additional 29-day period under the Archived Activities tab. If you rerun a saved search, you will receive an on-screen notification if you are searching a source outside your subscription.

To review your search history:

1. Click **History** in the upper right corner of the *lexis.com®* menu screen.
2. A list of today's results will display. Click an underlined search request under **View Original Results** to see saved results at no additional charge. Click **Re-run/Edit** to update or revise the search with your usual charges.
3. Click the **Archived Activity** tab to display a list of searches from the previous 29 days.

   Click an underlined search request to rerun or edit the request. (You will receive an on-screen notification if you are searching a source outside your subscription.)
4. Click **Client ID** or **Date** to sort all the requests. Click **Set Filter** to limit your history view to specific client(s) or date(s).

Table of Contents Sources

Expandable Table of Contents sources called TOCs make it easy to navigate through U.S. and state statutes and regulations, treatises and other secondary sources. You can click through the TOC levels, open and close multiple TOC levels, search the full-text source or just the TOC.

For example, to browse the TOC for *Moore's Federal Practice® – Civil* to find in-depth analysis on sanctions under Rule 11 of the *Federal Rules of Civil Procedure:*

Click through the TOC one level at a time:

Click any + to open that TOC level.

Click any − to close that level.

Open or close multiple TOC levels:

❶ Rest your cursor on any **+** or **−**. A pop-up menu shows you how many levels are open and closed—and how many items are at each level.* Select a level and click.

❷ Rest your cursor on any **+** or **−** to check your location. Select a level and click.* Select any full-text document. To return to the TOC, click the TOC link.

*Patent pending.

Or search the TOC for information on Sanctions under Rule 11 of the *Federal Rules of Civil Procedure*:

1. Type the following search in the TOC search box: *sanctions /10 rule 11*

2. Is the **Table of Contents** radio button checked? It is the default. Then click **Search**.

Your TOC search results show you a condensed TOC. Every line is a link. Blue links go to TOC levels—including full-text sections—where your search words appear. Black links do not include your search words but give you access to adjacent levels and documents for context.

Ⓐ Click on blue links to go to TOC levels or documents where your search words appear. To return to your TOC search results, click TOC Hits.

Ⓑ Click on levels with 📄 or • to link to full-text documents. When viewing a full-text document, click TOC Hits or Return to Results to go back to your TOC search results.

Ⓒ Click black links to expand your research to adjacent levels or documents. To return to your TOC search results, click TOC Hits.

The *Shepard's*® Citations Service

Is it good law?

The *Shepard's* Citations Service provides the comprehensive citations history and treatment coverage necessary to **verify the status** of:

- Federal case law
- Case law from all 50 states, D.C. and Puerto Rico
- *United State Code* sections and statutes from all 50 states and D.C.
- Regulations, including the *Code of Federal Regulations*
- U.S. and state constitutional provisions
- Court rules, including the *Federal Rules of Evidence* and *Federal Rules of Civil Procedure*
- Law review articles from selected publications and annotations
- Individual U.S. patents

Shepard's can also be used to **find authority**, i.e., identifying cases and articles that have cited your case.

Shepard's results include:

- Editorial analysis available **within 24 – 48 hours** after a case decision is available online
- **References to unpublished decisions,** law reviews, treatises and LexisNexis Headnotes
- Checks of an authority's **official and unofficial citations**
- **Links** to cases that cite your case
- Easy methods for **researching specific points of law or fact patterns**

To *Shepardize* a Case at *www.lexis.com*:

1. Click the **Shepard's** tab at the top of the menu screen.

> **NOTE:**
> To *Shepardize* the case you are viewing, click the *Shepardize* link at the top of that case.

2. Type the citation on the open field.
3. Select **Shepard's for Validation (KWIC)** or **Shepard's for Research (FULL)** format. The default is FULL.
4. Click **Check.**

Report Formats

Shepard's for Research (FULL)—shows prior as well as subsequent history plus every available citing reference. It also includes the *Shepard's* Summary, which shows you at a glance how citing references impact your authority. **Shepard's for Validation (KWIC)**—shows subsequent history, citing references with editorial treatment of your case, and new references that have not been analyzed by *Shepard's* editors.

Click *Shepard's*

Click *Shepard's*

Type citation

Select *Shepard's* KWIC or FULL

Click "Check"

Reading Your LexisNexis *Shepard's* Report

A   *Shepard's* Signal indicators show that the *McNeil* ruling has strong negative treatment in its subsequent history.

B   Find LexisNexis Headnote references. HN16(60) means the issue discussed in Headnote 16 of your case has been referenced 60 times in citing cases.

C   See the full text of the LexisNexis Headnotes associated with your case.

D   Link to vital references—even LexisNexis Headnotes and treatises—from here. Or …

E   Use the lower Navigation Bar. Select a treatment, jurisdiction or LexisNexis Headnote and go!

F   Customize your report even more—all on one screen. Restrict by specific treatments, headnotes, jurisdictions or dates. Or find vital points of law or fact patterns within references.

G   Click on a treatment phrase, e.g., "followed by;" get a detailed definition.

H   *Shepard's* Table of Authorities identifies the cases *your* case cited and includes *Shepard's* Signal indicators to indicate the cases' treatment by other courts.

I   Click a pinpoint page number; move to that page within the reference. Click HN16 and move to that portion of the citing case where Headnote 16 issues are discussed.

J   The *__Display Options__* link lets you display or hide your citing references' *Shepard's* Signal indicators and pinpoint page numbers references.

K   Click on the citation and view the full text of the document you *Shepardized*™.

L   Click **Legend** to see the definitions of *Shepard's* Signals.

Shepard's Summary: Look Here First!

Each *Shepard's* Summary presents an easy-to-read synopsis that brings the most vital case information right to the top and shows you why your case received the *Shepard's* Signal indicator. For example, as shown below, you can quickly determine *McNeil* has been overruled on one point of law. You also discover it has been followed—a possible split of authority.
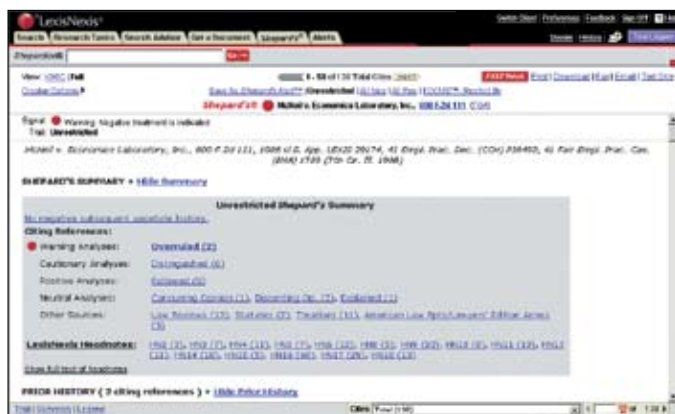
To move to any grouping shown:

1. Click the link for an analysis type, e.g., "Overruled." Move to the first reference (case, law review, etc.) Click the reference's name to move to the first mention of *McNeil*.

If the citing reference is an opinion, click the pinpoint page-number link, e.g., p. 836, to move directly to where the specific analysis is given. Just click the Return to *Shepard's* link to return.

2. To move to the next citing reference with the same treatment, go to the *Shepard's* Navigation Bar in the lower-right corner. Click the right arrow.

> **Only the LexisNexis services provide a "true" positive indicator.**

Use the Navigation Bar to Link to a Specific Treatment or Jurisdiction

Click the drop-down menu next to Cites. Choose a treatment or jurisdiction … and move directly to the selection you highlighted. Then, to move to chosen references, e.g.:

- **next cite:** click the **right arrow** at the end of the bar.
- **previous cite:** click the **left arrow**.
- **a specific reference** (e.g., 4 of 9): ENTER: 4 and click **Go**.

Move to next citing reference

Shepard's Signal

The *Shepard's* Signal is an at-a-glance indicator of the precedential status of a case. To review this legend while you research in *Shepard's*, click the Legend link at the bottom-left side of your report.

Warning—Negative treatment indicated
Contains strong negative history of treatment of your case (for example, overruled by or reversed).

Questioned—Validity questioned by citing references
Contains treatment that questions the continuing validity or precedential value of your case because of intervening circumstances, including judicial or legislative overruling.

Caution—Possible negative treatment indicated
Contains history or treatment that may have a significant negative impact on your case (for example, limited or criticized by).

Positive treatment indicated
Contains history or treatment that has a positive impact on your case (for example, affirmed or followed by).

Cited and neutral analysis indicated
Contains treatment of your case that is neither positive nor negative.

Citation information available
Indicates that citing references are available for your case but do not have history or treatment analysis (for example, the references are law review citations).

Customizing Your *Shepard's* Report: All Your Options are on One Screen

Now you can restrict your *Shepard's* report to specific treatment phrases AND find references with specific words—all on one screen. Click the **FOCUS™–Restrict By** link at the top of your *Shepard's* report.

Custom Restriction options restrict your report view to specific treatments, jurisdictions, LexisNexis Headnotes, and/or dates. Click the box next to an option to select it. Select as many options as you need.

The FOCUS feature searches the text of citing references for specific words. Enter your search words in the FOCUS terms box, e.g., *front pay /30 future loss.*

When you're done selecting restrictions and/or adding search words, click **Apply.**

Combine Custom Restrictions and the FOCUS feature to narrow your research quickly and effectively. Use Custom Restrictions first to select jurisdictions, treatments and/or date ranges most relevant to your research. Then use the FOCUS feature to zero in on authorities dealing specifically with your issues or facts.

Click box beside each available option to select as a restriction.

Using *Shepard's* Table of Authorities

Shepard's Table of Authorities identifies the cases your case cited and includes *Shepard's* Signal indicators to show how these cases have been treated thereafter. *Shepard's* Table of Authorities reports provide:

- An at-a-glance analysis of the foundation of a case uncovering hidden weaknesses in cases that have no obvious negative treatment.
- Links to the text of a case for in-depth information on the legal authorities cited within a case.
- A case-finding tool for specific legal issues or points of law.
- Cases cited within law reviews that are available through LexisNexis.

> **NOTE:**
> Check the pinpoint page to see why a case was given the indicated editorial analysis. As part of your secondary sources research, you can use Table of Authorities to retrieve a list of all the cases cited in a law review article.

You can request a Table of Authorities report three ways:

1. Click the link at the top right side while viewing a case.
2. Click the **Table of Authorities** link at the top of a *Shepard's* report.
3. Click the **Table of Authorities** tab within the *Shepard's* option.

The *Shepard's* Table of Authorities report displays the list of cases in the following order:

- U.S. Supreme Court
- U.S. Circuit Courts then U.S. District Courts in numeric order
- Specialty courts
- State courts (alphabetically, highest court to lowest court)

Within the jurisdiction, the cases are arranged in the order that they are found in the decision and then by the volume number of the reporter if both appear on the same page.

Many of the features and functionality you find useful in *Shepard's* Citations Service are also available through *Shepard's* Table of Authorities, including the FOCUS feature, "pinpoint" page citations and the ability to print Table of Authorities reports.

A Click on the Return to *Shepard's* link to go back to your *Shepard's* report.

B Click on FOCUS™–Restrict By to search for fact patterns or legal concepts within the table's references. Also restrict your report to specific treatments, jurisdictions, headnotes and/or dates.

C Click on the pinpoint cite to move to the text of your case where it cites the cited case. (Click on the page cite link to move directly to that internal page.)

D Did your case rely on a case that is now in jeopardy? The *Shepard's* Signal indicator shows you quickly.

E Display the parallel cites. (Default is to hide.)

F Enter a cite to see another case's Table of Authorities.

G Click the box next to each reference you want to print, download or e-mail. Then click that function's link (e.g., print) at the top of the screen.

The LexisNexis® Alert Feature

Use the LexisNexis Alert feature to get **regular research updates** that you can view online or receive via e-mail. The *Alerts* tab on the main *www.lexis.com* menu offers:

- **Alerts**—Follow any research issue … legal, news, legislative/political and more on a monthly, weekly, business daily or daily basis—even up to three times per day.
- **Shepard's Alert®**—Get regular updates on citing authorities that could potentially affect the validity of your case.
- **CourtLink® Alert**—Get regular updates on court filing activity. Move directly to all the familiar LexisNexis CourtLink screens and features—without signing off the LexisNexis services.

To Set Up a LexisNexis Alert Update (formerly ECLIPSE updates):

First review your search results. Then click the Save as Alert link at the top of your results screen. (You can click this link even if your search found 0 documents.) Fill in the Save Alert form:

A Name your saved search.

B Select your update frequency:
- *monthly* (and choose the date and time of day)
- *weekly* (and choose the weekday and time of day)
- *every business day* (once, twice or three times per day)
- *every day* (once, twice or three times per day)

C Choose your delivery option—online, printer or e-mail. If you select e-mail, provide an e-mail address for the delivery. Click E-mail Options to personalize your e-mail update subject line and choose attachment type and formatting.

D If you want to be notified via e-mail when your search does not retrieve new documents, click the check box. (Applicable only when the e-mail delivery option is selected.)

E To exclude any duplicate documents, click this check box.

F To be notified via e-mail each time your search retrieves new documents, click this check box and add your e-mail address.

After you've made your Save Alert form selections, click **Save**.

Each time your search is updated, you receive only new items. Your stored Alert searches are listed every time you select the *Alerts* tab then an **Alert** sub-tab. From this sub-tab listing, you can:

- Edit or delete your saved search
- Run a FOCUS feature search on the most recent search results
- Review previous results
- Update your search on the spot

To Set Up a *Shepard's* Alert®:

First gain access to the *Shepard's* Alert* set-up screen. You can get there several ways:

- Select the **Shepard's** tab on the main *lexis.com* menu screen.

  Enter a citation and click the **Set up a *Shepard's* Alert** link. Then click **Set Up**.

- Select the ALERTS tab. Select **Shepard's Alert**. Enter a citation and click **Set Up**.

- Click on the **Save as** *Shepard's* Alert link at the top of your *Shepard's* report.

- *Fast set up!* On the Sign-On page for *lexis.com,* after entering your LexisNexis ID and password, select the **Set up a *Shepard's* Alert** radio button, enter a citation and click **GO**.

At the *Shepard's* Alert set-up screen:

Ⓐ **Name** your *Shepard's* update search. (The case name is the default.)

Ⓑ Select the types of **changes** to monitor. Choose:
- any **change** to the citation
- new **negative** analysis only
- a **combination** of settings you determine. Select the **Custom Settings** radio button, then click the Customize analysis, jurisdictions or LexisNexis Headnote settings link. Select Positive, Negative or other treatment changes. Select jurisdictions, any specific LexisNexis Headnote or available secondary source. Then click **Apply.**

Ⓒ Select your **update** schedule. Choose:
- Once every business day (Monday – Friday)
- Weekly (and select the day of the week—Monday through Sunday)
- Every other week (and select the week day—Monday through Sunday)
- Monthly (and select the date)
- Select a date to end your updates

Ⓓ Select your **delivery options**—online or via e-mail.

  (Click the e-mail options link to personalize your e-mail update subject line and choose attachment type. Also choose to get an e-mail alert even when there is no change.)

Ⓔ Click **Continue**. Review your selections. To confirm, click **Save**.

Just as with LexisNexis Alerts, saved *Shepard's* Alert searches are listed when you select the Alerts tab then the *Shepard's* Alert sub-tab. You can review current results. You can also update, edit or pause your *Shepard's* Alert.

To Set Up a CourtLink® Alert:*

Select **CourtLink Alerts** after you choose the *Alerts* tab. Click **Continue**, then enter your CourtLink ID and password. You'll see a list of your current CourtLink Alert search results. You can also review existing CourtLink Alert searches by clicking the gray Manage Alerts tab.

To set up a new CourtLink Alert search:

1. Click the red *Set New Alert* button.

2. Select a type of Alert:
   - Federal Subject Matter
   - Federal Appellate/ State Subject Matter
   - Litigant
   - Attorney/Firm
   - Judge
   - Class Action
   - Bankruptcy Chapter
   - Bankruptcy Debtor
   - Bankruptcy Creditor

3. After selecting an Alert type, you will move automatically to search criteria screens appropriate for your choice. Fill in the screen blanks, clicking **Next** and **Back** to move among the criteria screens. Then click **Set New Alert.**

*Pricing varies by market. Please contact your LexisNexis representative or Customer Support for more information.

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Index to *Learning LexisNexis®* – continued